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ABSTRACT

This paper explores the relationships among policy, structure, and culture of educational organizations, specifically, the relationships between policy-mandated educational change and the organizational variables of coupling and culture. A framework for research on policy implementation is presented, which illustrates the interactive relationships among policy, structure, and culture. The framework is used to derive key questions rather than answers, and to determine how each factor relates to change processes in schools. A 40-item bibliography is included. (LMI)

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Policy, Coupling and Culture: Three Factors Related to Change in Educational Organizations

An Exploratory Paper

by

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Policy, Coupling and Culture: Three Factors Related to Change In Educational Organizations

Our contemporary world is a dynamic and changing place. Changes are found in all areas of human endeavor and are bringing increased complexity to all individuals working in human organizations. Educational organizations are expected to be at the forefront of many endeavors for change. Fullan (1982) notes that educators in school organizations face numerous challenges from the complexities and numbers of changes which they are expected to make. He suggests that educational changes include those mandated through legislation, new and revised curricula and other projects which may involve the altering of school programs. Fullan concludes, "It is clear that change is common fare for school people" (p.4).

Since the early 1980's, extensive planning for changes in curricula and school programming has been underway in Saskatchewan. Two of the main aspects of programming policy which have emerged from the planning deliberations are the Common Essential Learnings and the Core Curriculum concept. Although much of the Core Curriculum material is at the beginning of the piloting stages, teachers will be expected to begin implementing the Common Essential Learnings in the fall of 1989.

The implementation of the curriculum policy mandate, of which the Common Essential Learnings are a part, is likely to affect and be affected by a number of groups of variables; one of the most important variables is the way in which teachers view the policy. Fullan (1982) notes that the implementation of any educational change is affected by the teachers' views of the change. Fullan's views are supported by the earlier work of Sarason (1971) who states that, "Educational change depends on what teachers do and think - it's as simple and as complex as that. It would be so easy if we could legislate changes in thinking" (p. 193). Policy implementation will also affect and be affected by organizational variables related to coupling (Firestone, 1985) and culture (Kilmann, 1984). Much of the failure of policy to bring about the desired changes to educational organizations seems to be related to the views, held by policymakers and administrators, that educational organizations function as highly rationalized bureaucracies where top-down implementation procedures will result in extensive changes to educational practice (Wise, 1983; Timar & Kirp, 1989).

The present paper represents the first steps of a research process in which relationships between policy and the structures and cultures of educational organizations will be explored. More specifically, the purposes of the paper are to examine the relationships between educational changes initiated by policy mandates and the organizational variables of coupling and culture. The paper begins with a discussion of policy and policy implementation for educational change; the initial discussion will also focus

on relationships which may exist between policy and the structure and culture of educational organizations. In the second part of the discussion, the couplings of educational organizations and the ways in which coupling is thought to relate to educational change are examined. Organizational culture and the relationships between culture and educational change comprise the third part of the discussion. In the concluding section, a framework for examining the relationships between policy and the coupling and culture of educational organizations is presented and discussed.

The Role of Policy in Educational Change

There are many forces, both internal and external, which are creating pressure for educational and social change in Canadian society. Fullan (1982) notes that, "We can take it as a given that there will always be pressures for educational change in pluralistic and/or externally influenced societies" (p.13). One mode of response to pressure for educational change is the development of policy statements made by provincial Departments of Education and school district boards of education. The following section begins with a discussion of the definitions of educational policy and of policy as a tool for the promotion of educational change. The remainder of the section examines the problems of policy implementation and concludes with a discussion of ways in which policies for educational change can be made more functional and the relationships between policy and the structure and culture of educational organizations.

Policy: A Definitive Understanding

Barrett and Fudge (1981) have identified several aspects which contribute to a definitive understanding of policy. In preparing many case studies of policy development and implementation, they state that, "Policy has variously been seen as a starting point for action, the focus of negotiations, or the whole complex framework of attitudes, values and practices that frame organizational activity" (p.270). They further suggest that, because of the complex linkages within and between organizations, policy may be more simply defined as something which one group of individuals wishes to see carried out by another. Within this relatively simple definition there exists a whole continuum of intentions, decisions, programs, and procedures which are also perceived as policy because they are included as parts of frameworks which guide or constrain activity.

Barrett and Fudge (1981) also note that policy may be defined as property which is owned by a particular group. One of the main issues related to ownership becomes the degree to which the policy implementation process is retained or shared by a particular policy-making group. Barrett and Fudge conclude their definitions by suggesting that policy may also be

viewed as an innovation. As such, they suggest that policy is basically addressing situations which require changing. Other writers (Fullan, 1982; Joyce & Showers, 1987) suggest that the innovations which form the basis for educational change are often presented in the form of policies.

Joyce and Showers (1987) suggest that policy making is, "... a process of formal debate that results in guidelines for action" (p. 151). They reiterate the point that policies emanate from many different sources and are formulated in a variety of ways. Occasionally, policy develops from decisions made at a practical level; at other times policy is developed through formal debate. They particularly note, however, that policies which oppose the culture of the organizational setting for which they have been developed are more difficult to implement and to enforce. Joyce and Showers conclude that policy analysts need to carefully reflect on how a particular policy will interact with the organizational norms and the best way to proceed with implementation.

Closely related to Joyce and Showers' (1987) concerns, Barrett and Fudge (1981) suggest that two additional concepts, negotiation and discretion, are closely linked to the analysis and implementation of policy. Barrett and Fudge note that the degree to which negotiation and discretion are addressed as part of the policy continuum strongly influences the degree to which the policy will be successfully implemented. They conclude that the policy-negotiation process is an integral part of a successful implementation process.

In summary, policy is often viewed as a framework for guidelines to action within organizations. Policy makers and analysts need to include the concepts of negotiation and discretion in their reflections and deliberations on policy formation and implementation. The success or failure of policy implementation is likely to be closely related to successful policy negotiations within and external to the group and to the thoughtful discretion of those managing the policy. Innovations in the forms of policy are frequent contributors to educational change.

Policy as a Tool for Educational Change

The use of policy as a tool for educational change develops within, "... an environmental system, from which demands and needs arise, and upon which policy seeks to have an effect" (Barrett & Fudge, 1981, p. 8). People within the changing environmental scene create pressure for educational policy changes in response to broad categories of social change. Among the categories are 1) natural disasters such as floods, famines or earthquakes; 2) external forces related to new or imported technology, changing societal values and increased immigration; and 3) the appearance of discrepancies in the equality of educational opportunities provided to any particular group in the population (Fullan, 1982).

Educational policy analysts have attempted to create policies aimed at addressing public concerns related to social change. Since 1945 most of the educational policies aimed at educational innovation in Canada have been related to the modernization of the curriculum and equalizing the educational opportunities of all students. Firestone and Corbett (1988) note that similar policy thrusts have been dominant in American schools during the same time span. They note, however, that in the late 1970's a third major thrust was added; this thrust was the focussing of the change process at the local school level. The thrust for placing change at the local level was directed by school improvement officials and researchers who began to note the difficulties of implementing change at the school level using diffusion paradigms similar to those used in marketing. Firestone and Corbett noted that these paradigms assumed a unitary decision-maker, top-down approach to implementation. Therefore, many innovations were not being implemented. Firestone and Corbett conclude that, as a result of research on implementation conducted in the late 1960's and early 1970's, educational policy makers began to examine several alternatives to assist with policy implementation at the local level.

Policy analysts and policy makers use several policy tools to encourage change efforts at a local district or school level (Firestone and Corbett, 1988). One such tool is the mandate, a set of rules or regulations that designate what shall be done. Mandates are most successful in situations where clear educational goals exist, where there is public and professional support for the mandate, and where the mandated change is feasible for the designated setting. Another tool, in the form of an innovative grant, often accompanies a mandate. Grants are often and imperative support mechanism to ensure the implementation of mandated change. However, grants are not viewed as being independently useful for the implementation of educational changes.

A third policy tool for promoting educational change at the local level is the dissemination process. Innovators relying on a dissemination process for implementing change assume that a particular knowledge base exists which will promote educational improvement and that teachers, when they become aware of this knowledge, will be willing consumers and users. Dissemination is often an appealing view of the innovation process for policy-makers because of the likelihood of the involvement of highly-qualified technical innovators in the implementation process. Because of the intricacies in the relationship between the dissemination process and the culture of schools, dissemination, alone, is often insufficient to ensure educational change. Firestone and Corbett's (1988) research indicates that none of the three policy tools are likely to result in the implementation of educational innovations when used individually. They contend that, although the advantages and disadvantages have not been fully explored, "In

practice, there is a growing tendency to combine grants, mandates, and assistance in various combinations" (p. 329).

Cuban (1984) also discusses the use of district policies and mandates as tools for local school reforms. He notes that, often, such policies are aimed only at raising student test scores. He further suggests that these policies are conceptually simple and rely on traditional top-down implementation strategies which tend to promote tighter coupling between the goals of school districts and schools. Cuban contends that many policies, instigated by superintendents and adopted by school boards, relate only to such topics as the establishment of districtwide instructional goals, district student-promotional policies, district planning, curriculum development, teacher evaluation, program evaluation and staff development. He indicates that growing numbers of practitioners are accepting such policies as effective. Despite their acceptance, Cuban concludes that, "The fact remains that no studies have yet shown which policies, independent or in combination, produce the desired effects" (p. 134).

Cuban (1984) contends that the announcement of a policy decision denotes the beginning rather than the end of the implementation process. The earlier findings of Barrett and Fudge (1981) concur with Cuban's contention. They note that, "Policy does not implement itself . . . " (p. 9). Barrett and Fudge also suggest that policy implementation is not often a rational, hierachical process. They contend that much of the failure to successfully implement policy is a result of the belief that, ". . . policy is the starting point, the trigger for action, and implementation a logical step-by-step progression from policy intention to action" (p. 12). Wise's (1983) view concurs with those of Barrett and Fudge; he contends that when policy makers believe they can effect change merely by legislation they are engaged in wishful thinking. He states:

> When policymakers require by law that school achieve a goal which in the past they have not achieved, they may be engaging in wishful thinking. Here policymakers behave as though their desires concerning what a school system should accomplish will, in fact, be accomplished if the policymakers simply decree it.

<u>The Dilemma of Implementation: Why Educational Policies Often Fail</u>

Wise (1983) suggests that public demands for greater accountability and efficiency in education have caused policymakers to overrationalize schools and school reform. He states that, ". . . policymakers' efforts to reform school practices result from and in an excessively rational view of schooling. . . . " (p.94). He concludes that often this overrationality fails to lead to real school reform.

Wise (1983) gives several examples of overrationalization in educational policymaking and reasons for the frequent failures of the policies to be implemented as intended. Initially, he suggests that policymakers have become excessively prescriptive, going beyond the usual issues related to budgets and the standard number of school days, developing policy statements with expected outcomes related to the processes of education. Often, such prescriptions are not examined in advance to determine their feasibility. As a consequence, the policies fail to produce their intended results. A second concern related to overrationalization is that often, as policies legislate the use of new procedures, old procedures continue to be kept in place. Wise suggests that this results in excessive procedural complexity, often defeating the purpose of the original intention of the policy.

Overrationalization has also lead to the development of policies which provide inappropriate solutions to problems. Wise (1983) states that, "The logic that connects the problem to the solution is faulty" (p. 96). One example of a policy which created an inappropriate solution was a policy in which a school career program was created to assist students who were having difficulty in finding employment following highschool graduation. The career program did not have significant impact in the situation because the actual problem was a lack of jobs rather than the graduates' lack of job application skills.

Closely related to policies as the inappropriate solutions to school problems are conceptually simplified policies which provide only superficial solutions to complex educational problems. Cuban (1984) notes that many of the policies which are linked to the concept of school effectiveness are, "... conceptually simple and targeted like a rifle shot on lifting test scores" (p. 133). Such narrow policies may miss the more complex problems, related to the educational process, which really need to be addressed. Wise (1983) discusses simple solutions as first-order solutions in which, "A school problem is identified and the statement of the problem becomes the statement of the solution as a first-order analysis of the problems is made to yield the solution" (p. 96). Examples of such policies include those drafting accountability programs for schools because schools were not viewed as accountable. Similar situations have resulted when students appeared insufficiently prepared for work and further education when graduating with a requirement of twenty-one credits; consequently, policy requiring twenty-four credits was legislated. Wise suggests that the passage of conceptually simple policies are merely superficial and are likely to fail in their mandate. He concludes that, "Tinkering in superficial ways with the outcomes of schooling is very far from the real solution" (p. 96).

Educational policies which lead to the adoption of rational management models from industry into school settings presents another

example of conceptually simplified policies. The use of such policies reinforces a narrow, deterministic view of schools and school systems (Wise, 1983). Wise notes that policies which are developed from such a viewpoint are often designed to alter educational practices without taking the educational process and its effects on students and teachers into consideration. Common's (1983) views concur with those expressed by Wise. She illustrates her view with the metaphor of teachers as agents or consumers who are powerless, passive, uniform and changeable. She concludes that when policymakers hold this viewpoint, they tend to believe that, "Teachers are to be acted upon and are not to act independently or out of cue in the grand concert of reform" (p. 205). When teachers are viewed in a deterministic manner, they are unlikely to act as great implementers of educational reform policy.

In addition to being conceptually simple, some policies are also tend to be overly prescriptive in nature. In their discussion of policies which are being devised by both state and local school districts to promote excellence in schools, Timar and Kirp(1989) note, as did Wise (1983) and Cuban (1984), that recent policies to promote excellence have tended to be highly prescriptive. In addition, the span of policy influence has grown to ensconce almost all areas of school life and activity. The current goals of educational reform policies seem to be to change the behaviors of students and teachers to have them conform to a conceptually narrow excellence agenda (Timar & Kirp, 1989; Cuban, 1984;). Policymakers who attempt educational reform through the changing of individuals' behaviors have found that, "... [B]ehavior is not easily manipulated" (Timar & Kirp, 1989, p. 4). Timar and Kirp conclude that, "Public policymakers have been forced to confront the often unhappy truth that when the successful implementation of policy depends upon changing behavior, failure can often be anticipated" (p. 4).

Another of the main reasons for the failure of educational policy is that policymakers are often unwilling to consider teachers' and administrators' views on educational policies (Hall & Loucks, 1982). Educators often appear to give little thought to the pressures and perspectives experienced by policymakers. Hall and Loucks note that, "... [T]here is a fundamental gap between policy initiatives and the realities of life in schools" (p. 134).

Hall and Loucks (1982) have suggested several reasons for the gap between policy initiatives and implementation. Initially, they suggest that policymakers are becoming increasingly distant from the life and work within schools. This is often due to lack of work experience within schools and, therefore, the lack of a common vision between the school people and policymakers. Teachers' work lives are also becoming increasingly complex. Shifts in demography and changes in norms and values make their lives more complex. Environmental changes also bring more pressure for changes

in school organizations, forcing educators into many complicated change processes, often simultaneously. Hall and Loucks note that communication across the policy-practice gap is unclear; consequently, when policies are implemented the changes may not be exactly as the policymakers had envisioned. This poor communication is also caused, in part, by a general lack of empathy between practicing educators and policymakers. Hall and Loucks conclude this aspect of their discussion by stating:

> Clearly, if the good intentions of policy initiatives are to be carried out, then there must be closer links between policy and practice. Policy must emanate from the realities of life in school; and policy expectations and implementation must be formulated with there same realities in mind. (p. 135)

In summary, public demands for efficiency have lead to an overrationalization of educational reform. This has contributed to excessively prescriptive policies, complexity of procedures and inappropriate and conceptually simplified solutions to problems. Other reasons for educational policy failure are policymakers' views of teachers as passive recipients of policy, difficulty in changing behaviors within schools, and the great rift often noted between educational policy and practice. The next section examines some ways in which failures can be overcome.

Successful Use of Policy for Educational Change

In considering the use of policy as a change process, Barrett and Fudge (1981) examine what is necessary in order for successful implementation. Early in their discussion of policy implementation, they discuss the use of a rational implementation model. The model is basically dependent upon: 1) knowing what to do; 2) the availability of required resources; 3) the ability to control the resources to achieve a desired end; and 4) clearly communicating to others involved what is wanted and controlling their performance (p. 13). As they developed their discussion, however, Barrett and Fudge modified the latter two steps. They summarized their conclusions by stating, "... [T]he policy-action relationship must be considered in a political context and as an interactive and negotiative process, taking place over time between those seeking to put policy into effect and those upon whom action depends" (p. 252).

Common (1983) also discusses the use of negotiation in educational reform. She suggests that collaboration between teachers and policymakers is one way to make policy implementation plans acceptable to both parties. Common particularly stresses the need for teacher acceptance of the plan. She reiterates, however, that policy negotiation must involve both sides,

equally, in attempting to reach a common middle ground from which policy action can begin.

Wise (1983) suggests several questions which he views as important for policymakers to ask as they prepare policy. A negative answer to any of the questions would be evidence to indicate that an overrationalized approach to the school organization and to policy making. Some of the most important questions are: 1) Can the policy solve the problem for which it is designed? 2) Are the group dynamics being considered as part of the implementation? 3) Are the solutions to problems complete and thorough? and 4) Are the goals proposed by the policy attainable for this organization? Wise concludes, that in order for educational policies to be successful, we must avoid comparing school environments with the factory metaphor and begin to search for a new paradigm to describe school organizations.

Cuban (1984) suggests, that many educational policies fail to be implemented because they are based upon a top-down implementation strategy. Instead, he suggests the use of a bottom-up implementation strategy. Bottom-up strategies concentrate on the development of a shared vision among staff. In addition, bottom-up strategies involve the creating of a team spirit and cultivation of mutual trust among staff. This strategy involves the process of collaborative decision-making as the basis for implementation. Cuban also notes, similarly to Barrett and Fudge (1981) and Common (1983) that mixtures of top-down and bottom-up strategies have been negotiated and have led to successful policy implementation. The common links for success, regardless of the process, seem to be collaboration and negotiation between the policymakers and the policy implementers.

Educational policies would be more likely to be successful and effective if they were more closely rooted in educational practice (Hall & Loucks, 1982). Hall and Loucks suggest that a contour research strategy be used to link the worlds of policy and practice. The contour research strategy is one in which the ideas which emerge are contoured to fit reality by practitioners and policy researchers. The contour strategy has similarities to the bottom-up implementation strategies suggested by Cuban (1984), Common (1983) and Barrett and Fudge (1981) in that it involves the collaboration of both practitioners and policy researchers. The ultimate mission for the use of a contour research strategy is the narrowing of the gap between policy and practice. In addition to the use of a contour research method, Hall and Loucks conclude that, "It is also critical that policy developers do more to anticipate ramifications, requirements for support, and complexities of implementing their solutions. Only then can the gap between practice and policy be bridged" (p. 158).

Purkey and Smith (1985) concur with the views of Cuban (1984) when they suggest that the best policies for bringing about lasting change and positively affecting student achievement are those which, ". . . encourage

bottom-up, school-specific reform efforts" (p. 354). They indicate that such policies rely on teacher collaboration and shared decision-making. Purkey and Smith contend that shared decision-making and collaboration are, "... integral to the process of creating an effective school culture" (p.359). They further contend that effective school cultures produce an environment which is conducive to teaching and learning. Purkey and Smith conclude that policies which are likely to have the greatest positive effect on school improvement are those which positively influence the culture of the school.

The backward mapping approach to is likely to be a successful strategy for the development of educational improvement policies (Purkey & Smith, 1985). The process, based upon three questions, begins with an analysis of the part of the organization which will be most directly involved with providing the intended benefits. The first question asked is: What conditions are in need of change in order to facilitate changes in service? When the changes have been determined, the second question becomes: What resources are necessary to bring about the desired change? The third question is: Are the adjacent levels of the organization able to provide the necessary resources and to influence the behaviors of those providing the services? The third question is asked at all levels of the organization. Purkey and Smith conclude:

> Underlying the process of backward mapping is the assumption that the only effective policies are those that succeed in actually altering behavior or structure at the delivery level and that this alteration can best be accomplished by formulating policy from a bottom-up perspective. (p. 361)

Related to their earlier discussions about staff collaboration and the backward mapping policy development process, Purkey and Smith (1985) suggest four general recommendations for successful policy development related to educational improvement and change. The first states that, "The school is the focus of change; its culture, the ultimate policy target" (p.362). They contend that school improvement programs must eventually involve the whole school. The second recommendation suggests that the staff must analyze their school using a set of effective school guidelines and then concentrate on areas which are likely to develop a more effective culture in the school. Purkey and Smith contend that, "Collaboration, participation ... are essential to wholescale attempts at school improvement" (p. 363). The third recommendation deals with the availability of resources, such as time and technical assistance, to aid the processes of collaboration and participation within school settings. The fourth recommendation reiterates the call for maximizing the role of the local school in change efforts; in addition, they express the need for recognizing the roles and legal

responsibilities of district school boards and provincial departments of education in the process. Successful policies for educational change can be formulated within the parameters of the four recommendations (Purkey & Smith, 1985).

Seashore Louis and Dentler (1988) mote, as have previous researchers, that mandated, top-down policies do not often lead to effective policy implementation. They note, that while bottom-up strategies for implementation are more attractive to school personnel, implementation is not always successful with them either. They not that, "Evidence suggests that leaving the responsibility for improving schools totally in the hands of local educators is not a viable alternative to the reform paradigm" (p. 35). They further note that, when left to their own devices, school staffs tend to choose innovations of low quality which are easily learned and implemented. They suggest that, where top-down and bottom-up strategies fail, their 'middle-out' knowledge use strategy is likely to work well.

The 'middle-out' model (Seashore Louis & Dentler, 1988) is a combination of top-down and bottom-up implementation models. The main elements in the model involve capitalizing on identifiable incentives for change, providing usable, practical knowledge to innovators so that implementation can proceed, creating opportunities which support teacher-innovators and opportunities for idea sharing to assist in improving local practice. The model also aims at stimulating the diffusion of ideas within and between educational agencies. In findings similar to those of Cuban (1984), the results of the study conducted by Seashore Louis and Dentler using the 'middle-out' model strongly affirmed the use of mixed implementation strategies.

In summary, educational policies for school and instructional improvement are most likely to be implemented when they are developed and introduced from a bottom-up perspective. Collaborative, negotiative approaches to policy implementation are likely to have a positive impact on school culture, are less likely to alienate staff, and are more likely to lead to successful change. Policies developed and implemented using bottom-up strategies are more likely to closely resemble practice; therefore, practitioners are less likely to feel alienated and will be more likely to implement the changes.

In the next section, the relationships between policy and the structures and cultures of educational organizations will be discussed. The discussion will begin with sections on organizational structures and then, in latter sections, include culture.

The Relationship Between Policy and the Structures and Cultures of Educational Organizations

In examining the implementation of educational policies, a number of writers (Wise, 1983; Cuban, 1984; Purkey & Smith, 1985) suggest that both structure and culture are important considerations when planning and implementing policies for school organizations. Wise (1983) suggests that there is a disjuncture between the rational model, often used in an attempt to implement policies into schools, and the reality of school organizations as seen by teachers. Teachers tend to view school organizations as much less rational than do school administrators. Wise states that, "The rational model of education is alien to the teachers' prior conceptions of education" (p. 106). He further suggests that, in reality, schools often function as loosely coupled systems. Therefore, new policies may not be successfully implemented because the systems within the school which control the process of education, namely the classrooms, are not tightly coupled enough to district or other hierarchical levels of the organization to be forced to comply with the implementation. Wise concludes that, "Educational policies fail because they are premised on the idea that the school is a rational organization - like a factory - which can be managed and improved by rational procedure" (p. 113).

Cuban (1984) contradicts some of Wise's (1983) pessimism about the implementation of policies into schools. Cuban contends that many educational organizations are moving toward a tighter coupling among schools and districts in an attempt to implement policies for improving student achievement. He notes that, "[A] counterimage now emerges . . . of organizations tightly coupled in both goals and formal structure, targeted sharply on academic productivity" (p. 134). Although Cuban concedes that it is not always a means for successful implementation of educational policies to make schools more effective, tight coupling in educational organizations is a tool which has proven successful in a number of instances.

Purkey and Smith (1985) use the structural image of schools as loosely coupled systems to strengthen their view for using the schools as the unit for educational change. They state:

> Essentially, loose-coupling theories suggest that district offices, state education departments, and federal agencies cannot exercise control over critical factors such as school climate or classroom processes. To the extent that this description is accurate, change, of necessity, must be focussed at the school level. (p. 361)

Purkey and Smith conclude that the school must be the unit for change because positively affecting teachers' and students' behaviors and attitudes is the only way to positively influence the process of education.

Purkey and Smith (1985) contend that the ultimate policy target for change must be the culture of the school. They reiterate that the elements of school culture are interrelated and that effective educational change policies must address the school as a whole. Firestone and Corbett (1988) concur with the views of Purkey and Smith. They state that, "Our view is that the most profitable direction is to apply more systematically the cultural perspective to understanding the change process" (p. 335). They contend that many administrators and individuals involved in the change process have been committed to a technical or, at most, a political perspective. They reiterate that, "[C]hange takes more than rational planning and persuasion"(p. 335). Therefore, administrators and change agents need to become aware that, in order to positively change the behaviors of teachers and students, and to influence the educational process, policies which will influence the culture of the school are more likely to be successful.

Contradicting views regarding organizational structures which promote change (Wise, 1983; Cuban, 1984) and the contention that organizational culture can be a tool for change (Purkey & Smith, 1985; Firestone & Corbett, 1988) the suggestion that further research on both topics would be valuable seems valid. The next section of the discussion will examine the structures of educational organizations and the relationships between structures and organizational change.

The Structures of Educational Organizations and Educational Change

Educational organizations are continually growing and changing. Our ways of describing and understanding the structure of educational organizations are also changing (Baldridge & Deal, 1983). This first part of this section consists of an examination of four views of the structure of educational organizations. The second part examines the relationships between organizational coupling and change in educational organizations. Relationships between organizational coupling and culture are explored in the third part.

The Structure of Educational Organizations

For most of the present century, the rational bureaucracy has been the predominant model used to describe schools and school district organizations. Bureaucratic organizations operate in a hierarchical fashion, with clearly defined goals and defined roles for worker participants. Bureaucracies are viewed as rational in the sense that they appear to be operating logically, with clear delineations made between goals, organizational structures, activities and outcomes (Patterson, Purkey & Parker, 1986). During the past twenty-five years, however, an increasing

number of writers and researchers have cast doubt on the view that educational organizations operate, mainly, as rational bureaucracies (Bidwell, 1965; Baldridge & Deal, 1983; Metz, 1983; Firestone, 1984; Weick, 1976; Meyer & Rowan, 1977, 1983; Allison, 1980; Patterson, Purkey & Parker, 1986). Baldridge and Deal (1983) contend that experience with organizations has shown that, " . . . [P]eople and organizations are not very rational-or at least that they operate from a logic very different from that of theorists and administrators" (p. 7). Metz notes that is has been clear for some time that schools do not totally fit the profile of the rational bureaucratic model. He suggests that theories of educational organizations as rational bureaucracies continue to exist because of our societies' familiarity with them. Metz concludes that further research is necessary to determine the ways in which schools function as rational bureaucracies and the ways in which the model is limited in similarity to the school.

Allison (1980) has completed a similar study to that proposed by Metz (1983). In his analysis, Allison compared the Weberian bureaucratic model with the actual models of public schools. While school organizations appeared congruent to Weber's model in terms of formal goals and establishment, the areas of structure, authority and technology were incongruent. Allison's major conclusion states that, "There does not appear to be a high degree of congruency between Weber's model of bureaucracy and the model of the public school" (p. 21). Allison notes, instead, that two loosely-coupled technologies appear to be operating within the school system. The classroom teaching component appears to be loosely-coupled within the school, while the administrative-management component appears to be loosely-coupled within the school system as a whole.

Earlier writers have drawn similar conclusions to those of Allison (1980). Bidwell (1965) was one of the first writers to discuss 'structural looseness' in schools and school systems. He noted that, due to the autonomy granted to teachers to carry out instructional tasks, ". . . school systems seem to differ from the classical bureaucratic structure" (p. 977). Bidwell also suggested that the lack of bureaucratization manifested itself as, ". . . the looseness of articulation between subunits" (p. 977). The main theorists writing about the structural looseness of educational organizations during the past decade have been Weick (1976) and Meyer and Rowan (1977; 1983). Weick's thesis deals with schools as loosely-coupled systems; Meyer and Rowan discuss educational organizations as decoupled and institutionalized through the use of myth and ceremony. Each of these thesis are discussed below.

The Theory of Loose Coupling

Weick's (1976) thesis, which describes educational organizations as loosely coupled systems, concurs with Bidwell's viewpoint. Weick's image of loose coupling, "... intends to convey the image that coupled events are responsive, but that each event also preservers its own identity and some evidence of its physical or logical separateness" (p. 18). The degree of coupling between two systems can be categorized on the basis of the variables which both systems share. Loose coupling is said to exist when two systems have few variables in common or share weak variables. Tight coupling implies many shared variables. One of the main advantages of the imagery of loose coupling is that 'blocks' can be added or deleted from the organizational structure, "... with relatively little disturbance to either the blocks or the organization" (p. 18). Two of the most common coupling mechanisms discussed in an organization are the technical core and the authority of office.

When the technical core is used as a coupling component, each element in the coupling is some kind of task, subtask, role or person. The couplings are task induced. When authority of office is the coupling mechanism, the elements include positions, offices, reponsibilities, sanctions, rewards and opportunities (Weick, 1976). Weick contends, however, that neither authority or the technical component seem to be the main coupling components which hold educational organizations together. He notes, instead, that intentions and actions, means and ends, teachers-materials, rate-payers and school boards, parent-teacher, process-outcome, or teacher-pupil are other elements which might be found in loosely coupled educational organizations. Weick also notes that it is not easy to determine which elements are coupled, and that the determination of elements is not a one time activity. He concludes that, because elements in organizations can appear or disappear over time, the theory of loose coupling may also be affected by the fact that the intensity and the nature of the coupling may have a part in the creation or dissolution of elements.

Weick (1976) suggests that there are at least fifteen different definitions of the phrase loose coupling. The differences in definition contain differences in the degree of the looseness. The definitions of loose coupling range from the idea of slack times or slack control over organizations resources to decentralization, delegation, and discretion over the pre-requisites for courses. These degree of coupling, portrayed by the definitions, are also likely to have an effect on the potential functions and dysfunctions of loose coupling.

Weick (1976) contends that there are seven main advantages to the functioning of loosely coupled system. He notes that loosely coupled systems lower the probability that the organizations will have to respond to each

small change which occurs in its environment. In addition, loosely coupled organizations are likely to be more sensitive to the needs and desires of their environments. Therefore, loosely coupled systems may be good for localized adaptation. As such, the system has the potential to retain a great number of mutations and novel solutions to situations. If and when subsystems in the system break down, they can be sealed off and not affect the other parts of the organization. Loosely coupled systems allow the personnel to be more flexible, have greater autonomy and thus, develop a stronger sense of personal efficacy. Lastly, loosely coupled systems seem to hold costs to a minimum because less resources are required for the coordination of personnel.

The functions of loosely coupled systems also have the potential to become dysfunctions (Weick, 1976). Although they allow the organization to persist by not responding to each little change that occurs in the environment, loosely coupled systems may not be selective in the aspects of the system that are perpetuated. Extreme sensitivity to the environment may also encourage loosely coupled systems to respond faddishly to concerns or demands. Because of their responsiveness and adaptiveness to local situation, loosely coupled systems be unable to exhibit the benefits of standardization to the environment. Looseness may also forstall the spread of advantageous changes throughout the system and forstall the repair of defective trouble spots. Heightened autonomy of personnel will shorten the chain of consequences from one actor to another. Therefore, each individual becomes a separate entity with whom to negotiate. Weick concludes that, although loosely coupled systems are inexpensive to operate, ". . . [L]oose coupling is also a nonrational system of fund allocation and therefore, unspecifiable, unmodifiable, and incapable of being used as means of change" (p. 24).

In summary, loose coupling conveys an organizational image in which subsystems are connected to each other, but also preserve a physical or logical separateness. The degree of coupling between subsystems is categorized by the number of variables the subsytems share. Tightly coupled subsystems and systems share many common variables. Weick (1976) notes that there are approximately fifteen definitions of the loose-coupling concept. In addition, he also notes seven functions and dysfunctions of the concept.

Educational Organizations As Institutions

Meyer and Rowan (1983) also present an organizational structure which operates, to some degree, as a decentralized or decoupled entity. In their view, however, decoupling is developed from within a formal bureaucratic structure. Meyer and Rowan contend that education today takes place in large, public bureaucracies which embody educational purposes and goals within their structure. These organizations exist to

provide education for society, rather than for families or individuals. Educational organizations become the defining factor in society, preparing individuals for political and economic life; schools and universities also help to produce a stratification of society. Education, therefore, comes to be viewed as a set of credentials which are used to incorporate citizens into society. As these credentials become standardized, societies develop large, educational bureaucracies to ensure that, "A workable identity market presupposes a standardized, trustworthy currency of social typifications that is free from local anomalies" (p. 73).

As the importance of educational credentials increases, the public expects educational organizations to become standardized in terms of both the types of students and graduates produced and the types of programs which are taught. As a result, institutionalized rules defining and standardizing the educational process have been developed (Meyer & Rowan. 1983). Standardization provides a uniform language in which schools can communicate with society. Schools also use ritualistic standardization to provide order and gain prestige in society. Meyer and Rowan contend that, through the institutionalizing of standards and rules, educational organizations are viewed as credible and trustworthy. Therefore, educational organizations are granted the resources they need to fulfill their mandates.

Meyer and Rowan (1977) suggest that conforming to institutionalized rules is often found to conflict with the criteria of organizational efficiency; yet controlling efficiency can undermine an organizations ritual conformity and sacrifices its support and legitimacy in the eyes of the public. In attempting a response to the dilemma, Meyer and Rowan state that, "To maintain ceremonial conformity, organizations that reflect institutional rules tend to buffer their formal structures from the uncertainties of technical activities by becoming loosely coupled, building gaps between their formal structures and actual work activities" (p. 341).

In addition, Meyer and Rowan (1983) contend that, because educational organizations are partially funded and controlled locally, the process of instruction is, to a large degree, decoupled. Although schools rely heavily on ritualistic standardization to provide order and maintain the appearance of efficiency, Meyer and Rowan note that there seems to be an avoidance of the evaluation and inspection of instruction. They note that, instead of direct and consistent inspection of instruction, tests of student achievement are used to examine and determine educational output. While some tests are standardized on a system or state-wide scale, many teacher-made tests are considered valid measures for the standardization of educational output at a local level.

Meyer and Rowan (1983) argue that the decoupling of educational organizations from technical (instructional) activities and outcomes actually

assists in maintaining the legitimacy of the organizations. They suggest four main reasons why decoupling is used. Firstly, they note that the avoidance of close inspection of instruction in schools, when accompanied by displays of trust and confidence, can increase the commitment and shift the responsibility for upholding the rituals to the teachers in the organizations. Secondly, close inspection is overlooked and replaced with displays of costly facilities, expensive programs and well qualified teachers; educational quality is judged much more often on economic factors than on concern for the liabilities in the instructional system. Thirdly, decoupling protects the ritual classification scheme from uncertainties which may arise in the technical core. Decoupling can provide the buffer between an unsuitable policy mandate and the negative effects which would likely occur in student learning because of the policy. Fourthly, decoupling of schools allows them to be responsive and adaptive to local environments, therefore, maintaining the support of the local population. As a strategy for maintaining the support of a pluralistic environment, decoupling appears to be a successful. Meyer and Rowan conclude their discussion of decoupling by stating:

> Our point is this: By decoupling formal structures from activities, uncertainty about the effectiveness of the ritual categories is reduced. When the behavior of teachers and students is uninspected or located in isolated classrooms, the state, the community, and administrators are presented with little evidence of ineffectiveness, conflict or inconsistency. (p. 79)

Meyer and Rowan (1983) contend that decoupling in educational organizations is made possible by a concept they term as the logic of confidence. In defining the logic of confidence, they state that, "Parties bring to each other the taken-for-granted, good-faith assumption that the other is, in fact, carrying out his or her defined activity" (p. 79). The logic of confidence works similarly to a large chain reaction in which the community has confidence in the school board, the board has confidence in the superintendent, who in turn has confidence in the principal and the teachers. Meyer and Rowan stress that, in addition, the logic of confidence goes beyond personal orientations to encompass public institutions.
The public has confidence in the teachers because they are accredited through their educations at accredited universities and by the standards of the department of education, two other organizations in which the public also has confidence.

The logic of confidence contains, ". . . [T]he process of maintaining the other's face or identity and thus of maintaining the plausibility and legitimacy of the organization itself" (Meyer & Rowan, 1983, p. 79). Meyer and Rowan contend that this process is made possible by three face-saving

procedures which are promoted by decoupling. The first, avoidance, is at a maximum level when communication between and among the organizational segments is minimized as is often the case in school organizations filled with self-contained classrooms. The second, discretion, is maximized when supervision and inspection are minimized because the technical-instructional component is entrusted to individuals with professional credentials. Thirdly, overlooking occurs when embarrassing or deviant incidents are passed over as unusual and not the norm and are thus viewed as nonthreatening to the integrity of the ritual classification scheme of the organization.

The greatest myth upon which the logic of confidence operates is that of teacher professionalization. This myth, under the protection of the educational bureaucracy, serves to protect teachers from close scrutiny and limits controls over their work to superficial and categorical aspects. Meyer and Rowan (1983) conclude their discussion of the professionalism myth with the explanation that, "The myth of teacher professionalism helps to justify the confidence placed in teachers and to legitimate the buffering of uncertainty in the performance of pupils and teachers in educational organizations" (p. 81).

In summation, Meyer and Rowan (1983) also address the concept of loose coupling in educational organizations. They suggest that loose coupling develops in educational organizations as a buffer between the formal institutional structure and the uncertain technical core. They suggest that loose or decoupling is made possible by the logic of confidence in which those involved in educational organizations bring with them the assumption that other members of the organization are carrying out their mandates appropriately. The logic of confidence is based on the fact that all members are accredited or certified as competent for their positions. The greatest myth upon which the logic of confidence operates in educational organizations is that of teacher professionalism.

An Analysis of Loose Coupling and Institutionalization

Based upon a thorough perusal of the work of Weick (1976) and Meyer and Rowan (1983), Willower (1982) offers an interesting analysis of the concept of loose coupling. Initially, he notes the ambiguity in the meaning of the concept. While Weick contends that loosely coupled systems come about due to homogeneity, constraint and low discretion which lead to uniformity, Meyer and Rowan contend that tight coupling occurs due to formal authority and rules. Willower also notes that, while Weick's application of the loose coupling concept is broad in nature, Meyer and Rowan relate loose coupling to specific situations is schools. Willower contends that questions about the meaning of loose coupling can be answered more readily when they are tied to specific situations.

Willower (1982) also suggests that schools and classrooms are likely to be a mixture of loose and tight coupling. Classrooms may function as tightly coupled subsystems while the supervisory work of administrators remains loosely coupled to the instructional work of teachers. Therefore, He states:

> Thus, it would seem that loose coupling in educational organizations is highly contingent. It would be helpful if coupling were treated as a variable, that is, as a continuum, since some elements of school organizations or some subsystems appear to be a different ends of the continuum. (p. 97)

Willower also suggests that there are limits to the logic of confidence due to greater environmental dissensus and internal consensus than has been considered by Meyer and Rowan. Despite the ambiguities of meaning and variations in the situational application, he concludes that the concepts of loose coupling and institutionalization have enriched our understanding of the functioning of educational organizations.

In their analysis of organizational structure, Corwin and Borman (1988) note two distinct interpretations of the term loose coupling. They note that, from a sociopsychological viewpoint, loose coupling refers to inconsistent, nebulously defined preferences which appear in the decision-making processes used by individuals to cope with ambiguity. From a sociological perspective, loose coupling refers to the relationship among the components of a natural social system. Natural systems are described as having ambiguous goals, low integration of the organizational hierarchy, loose participation and unclear technology. Corwin and Borman conclude that, "These relationships are products of both conflict and impersonal evolutionary accommodations" (p. 214).

Corwin and Borman (1988) are also critical of the distinctions made between bureaucracies and loosely coupled systems by others writers and researchers. They suggest that the loose coupling metaphor can be explained as a misunderstanding of an overreaction to Weber's model of bureaucracy. Corwin and Borman contend that, rather than intended as a model for all organizations, Weber's model was devised as a means to organize administration. They note, instead, that the model has and continues to be valuable because it suggests important variables to use in studying and comparing organizations. They suggest that schools and school districts operate as complex organizations. Corwin and Borman define complex organizations as, ". . . composites of bureaucratic, professional, and political variables" (p. 214). They conclude that the complex organizational model is applicable to schools and can accommodate ideas as diverse as bureaucracy and loose coupling. In addition to their main conclusion, Corwin and Borman

recognize that other authors are supportive of the view of schools as loosely coupled organizations.

Support for the Loose Coupling Model

Mintzberg (1983) supports the use of a decentralized organizational structure for organizations in which most workers are professional and which operate in complex environments. Mintzberg's theory bodes well for educational organizations which, staffed by professionals, attempt to provide services to a dynamic and uncertain environment. Mintzberg also suggests several other reasons for decentralization. Initially, he contends that not all the necessary decision-making can be done adequately by one individual; decentralization provides an opportunity for the involvement of others. A second reason is that decentralized organizations are able to respond more quickly than centralized organizations to the demands of the local environment. Lastly, Mintzberg suggests that decentralization in organizations is a stimulus for motivation. He contends that the motivation issue is particularly crucial for workers in professional organizations.

Mintzberg (1983) also warns of some concerns about decentralization. He notes, initially, that there can be problems with the standardization of skills in decentralized organizations. As a result, the organization may be unable to cope with many of the needs which arise. Decentralization in organizations may enhance problems in dealing with professional workers who display incompetence or are unconscientious; this is largely due to the lack of coordination and supervision in loosely linked organizations. Mintzberg also notes that decentralization can inhibit, somewhat, the ability of an organization to be innovative and to implement change.

Patterson et al. (1986) reiterate several of the positive aspects of decentralization, previously noted by Mintzberg (1983), for school organizations. They note that decentralization allows power to be spread throughout the organization. As a result of more widespread empowerment, individual teachers and in-school administrators are likely be more motivated, innovative, and to take greater pride in and ownership for their work in the classroom. Patterson et al. also note that decision-making is positively affected because the decision-making process in decentralized organizations takes place as closely as possible to the areas which are likely to be affected by the decisions. In addition, decentralization allows the energy of professional workers within school organizations to be used to meet multiple sets of goals imposed by varying groups and individuals acting within a complex environment. Instructional practices also benefit from decentralization; rather than adhering to the 'one best method' approach to teaching, teachers are free to develop instructional tactics which are likely to be most beneficial to the learning experiences of their students. Patterson et al. conclude their discussion of decentralization by stating that,

"... the reality of loose coupling reinforces the need to view decentralized empowerment as the most effective way to make a difference in classrooms" (p. 30).

In addition to the image of loose-coupling as an important alternative to the rational bureaucratic image of educational organizations, Firestone and Herriott (1981) have identified a third image, the political system, as another possibility for the structure of educational organizations. The political system image is described in the next section.

Educational Organizations as Political Systems

Firestone and Herriott (1981) have identified a third image which is partially related to the loose-coupling and institutionalization models of educational organizations. The political system image is similar to the institutional model in that it relies, at least partially, on the logic of confidence as part of the exchange between the school and the school district, as well as between the school and its environment. The image is also partially loosely-coupled.

The political system image, "... focuses on the dynamics of the aggregation and use of power by individuals and groups both in and out of the district" (p. 239). Under this image, the school district is thought to constitute a negotiated order which is constantly shifting in response to group pressure. The primary direction for the organization is set by commitments that develop from negotiation and conflict. Because of the assumptions that all activity is neither centrally directed or individually motivated, the political system image lies midway between the rational-bureaucratic and the loosely-coupled systems image.

The political system image is not based upon the assumption that the goals of the organization drive the behavior of the teachers within. While some general goals are accepted by all organizational members, they tend to be diffuse in nature and are accomplished by a variety of behaviors. Often there are competing sets of goals forced upon the system by groups of individuals both inside and outside the system (Firestone & Herriott, 1981; Patterson, Purkey & Parker, 1986). The political system image suggests that all organizational members have a set of incentives and sanctions at their disposal which may be derived from the hierarchy of power, task-based dependencies based upon the division of labour, or individual knowledge and skills. These incentives and sanctions can be used in a variety of ways in order for groups and/or individuals to accrue power. Power may be accrued by negotiation or conflict. Because many individuals in organizations fear conflict, exchanges are often made among individuals within the organization by negotiation.

Under the political system image, instruction in schools is seen as being partially decoupled from the administrative apparatus. This image recognizes that there is some interaction and negotiation in terms of what courses are to be taught and how they are to be taught. These conditions vary in response to both internal and external environmental conditions, however teachers are always offered some choice and control over the area. Political systems are open systems which allow for environmental impact. Such impact, however, tends to fluctuate rather than being consistently strong or weak. There is an assumption within the political image that suggests that district staff effect as well as respond to external factors. Both inside and outside individuals are seen as having parts in the negotiation and conflict processes which lead to the making of decisions. The fundamental differences between inside and outside individuals is that the school organization has external boundaries which can be manipulated to various degrees in order to include or exclude outside groups from active participation in the school organization.

In the next section of the discussion, organizational coupling and change will be discussed. Each of the four images of educational organizations will be considered as part of the discussion.

Organizational Coupling and Change

Firestone (1985) notes research findings that indicate that change does spread more quickly in tightly coupled schools. Earlier studies by Corbett (1980) and Wilson and Corbett (1983) drew similar conclusions. Corbett's study examined the degree of coupling and the scope of change in school organizations. Theoretically, the study was based on Weick's (1976) findings that three types of loose coupling existed: 1) Zoning of control - which divided the decision-making responsibilities among the organizational subunits; 2) Remote coordination of instruction - which referred to variation of instructional delivery among subunits; and, 3) Damping in subunits - which noted the extent to which activity in one subunit did not necessitate activity in another subunit. Corbett noted that the scope of change was associated with the degree of coupling within a school. He also noted that low scope changes were made most easily because they fell within the zones of control the the individuals making the changes; such changes seemed to be facilitated well by loose coupling. High scope changes were implemented when school-wide goals, shared decision-making, and even top-down strategies were evident. Corbett states that, "School staffs expressed the opinion that high-scope change could occur if changes were mandated" (p. 38).

Wilson's and Corbett's (1983) study involved an examination of the effects of school linkages on change. They based their concept of linkages on

the concept of loosely coupled systems; however, they chose the term, linkages, to represent coupling in their organization because of the difficulties which exist in defining loose coupling as it exists in specific school situations. The term was also chosen because their study involved the comparison of subunits within schools rather than comparisons between schools. Wilson and Corbett noted that, in operationalizing school linkages, there were three distinct categories: cultural, structural and interpersonal. Cultural linkages were those mechanisms which were responsible creating and coordinating shared goals and definitions. Structural linkages were factors which were operated to exert control over the behaviors of organizational members. Interpersonal linkages examine the opportunities which organizational members have to interact with one another. Wilson and Corbett reached a number of conclusions regarding relationships between the linkage categories and the implementation process.

Wilson and Corbett (1983) indicated that, "The strongest correlation was between the cultural linkage [coupling] indicator and implementation" (p. 95). They also noted that the interpersonal linkages influenced how wide-spread the implementation in organizations became. They indicated, in addition, that their results were verifiable using both quantitative and qualitative research methodologies. Other results indicated that schools did not need to be tightly linked in all areas for implementation to take place. They stated that, "Selective use of particular kinds of linkage were used to increase the number of teachers making changes" (p. 97). One of the temporary linkage structures noted by Wilson and Corbett was the teacher planning committee, comprised of teachers and administrators, which made decisions collaboratively and enhanced the flow of information throughout the staff group. Lastly, Wilson and Corbett note that the results of their study indicated that the school and its subunits were the appropriate units of analysis for studying linkage and implementation. Relating to Wilson s and Corbett initial finding, the following section extends the discussion of culture as a coupling mechanism for change.

The Relationship Between Culture and Coupling

Culture is noted as being an important variable in the study of organizational coupling. Relating to the study of coupling, Firestone (1985) notes that, "Attention to culture is part of the general program of exploring the patterns of coupling in schools" (p. 20). He further suggests that researchers studying culture related to coupling will need to rely on qualitative methods of research for a more accurate understanding of the culture-coupling relationship.

Firestone (1985) notes that other writers (Peters & Waterman, 1982; Alfonso, 1986) have also viewed culture as an important aspect in organizational coupling. Peters and Waterman indicate that many excellent

corporate organizations have patterns of simultaneous loose and tight couplings which provide their employees with autonomy and motivation, but also with a strong sense of organizational closeness and unity. In describing simultaneous loose-tightness, Peters and Waterman state that, "It is in essence the co-existence of firm central direction and maximum individual autonomy - what we have called '"having one's cake and eating it too"' "(p. 318). In further discussion, they suggest that the loosest coupling in these organizations exists in the areas of direct supervision, work-process standardization and outcome standardization. They further suggest that tight coupling is derived through as strong culture which promotes shared values and a common organizational vision.

While Peters and Waterman (1982) suggest positive examples of the relationship between culture and coupling, Alfonso (1986) notes that cultures in school settings can and do sometimes work against the implementation of broadly based changes in schools. Alfonso refers to culture as the ' "unseen supervisor" '. He suggests that, while it may prevent chaos in school situations without available and effective supervision, culture can thwart valuable and well-intentioned change efforts in schools. Alfonso concludes that often, the assumptions, beliefs and practices which comprise culture are so firmly held that they are almost below the level of awareness of organizational participants. The next section of the discussion will focus further on the concept of organizational culture and change.

Organizational Culture and Change

Often, the cultural component is underrepresented in planned change projects. Firestone and Corbett (1988) note that many individuals, including state and local policy makers, school administrators, and program developers seem tied to a technical perspective of the change process. Technical perspectives involve bringing knowledge of innovations to teachers with the belief that, when confronted with the benefits of the innovation, they will readily make behavioral changes to implement the innovation. Some innovators have also tied a political perspective to the technical to deal with aspects of the conflict and discomfort which accompanies change processes. Firestone and Corbett note, however, that, ". . . change takes more than rational planning and persuasion" (p. 335). They suggest, in addition, that effective implementation strategy needs to involve the cultural perspective because change processes are such an integral part of teachers sets of values and beliefs. Firestone and Corbett suggest several additional reasons for involving the cultural factor in the implementation process. Firstly, they note that much valuable work has been done, recently, on the concept of organizational culture which is likely to be of value in developing a fuller understanding of the implementation process. Secondly, the work can be

useful in learning to manage the implementation more effectively. Lastly, they note that the cultural perspective can yield valuable information which could be used to positively influence culture and to create more effective school environments as part of change processes.

In order to use the cultural perspective to influence change, a fuller understanding of the concept must be reached. Therefore, the initial segment of this section will examine the definition and concept of organizational culture. The second segment will examine the strengths and limitations of the cultural metaphor.

Culture: A Definition of the Concept

The term organizational culture has developed from various forms of the term culture used in other contexts. Morgan (1986) suggests that the term has been metaphorically derived from the agrarian term related to the cultivation and tillage of the soil. In a modern and more sociological sense, he suggests that culture refers to patterns of societal development related to knowledge, ideology, values, laws and rituals. He states that the term is also relevant for understanding organizations because, "Important dimensions of modern culture are rooted in the structure of industrial society, the organization of which is itself a cultural phenomenon" (p. 114). Morgan also notes that the term 'corporate culture' has emerged because organizations as mini-societies that have their own distinct patterns of culture and subculture related to the values, beliefs, traditions, and routines of daily life in the organization. Morgan concludes that culture ensconces all aspects of organizational life.

Other writers have also noted the breadth and depth of influence which culture has on organizational life in their definitions. Kilmann, Saxton and Serpa (1985) define culture as, "... the shared philosophies, ideologies, values, assumptions, beliefs, expectations, attitudes, and norms that knit a community together" (p. 5). They indicate that culture exists in the behavioral norms and hidden assumptions of the organization. They further indicate that the behavioral norms are the unwritten rules of behavior which describe the behaviors and attitudes group members urge each other to follow. These norms are passed from generation to generation through stories, rituals, rites, and sanctions against non-compliant members. At a deeper level are the hidden assumptions which underlie the culture. These fundamental beliefs, which include beliefs about the environment, clientele, and chances for advancement, are likely to have a great effect on decision-making within the organization. They also note that culture is not an individual characteristic; instead it develops when as group comes together and evolves with growth and change within the group; the group is also seen as the a key factor for changing organizational culture.

Schein's (1985) views of organizational culture concur with many of those expressed by Kilmann et al. Schein defines culture as:

> . . . a pattern of basic assumptions - invented, discovered, or developed by a given group as it learns to cope with its problems of external adaptation and internal integration - that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. (p. 9)

Relating to his definition, Schein notes that, because certain assumptions have worked on a repeated basis, they are likely to have been taken for granted and dropped from awareness. Dealing with other aspects of culture, Schein notes that culture is to be viewed as an attribute of an independently defined stable social unit or organization; he also describes culture as a learned product of group experience. Similar to Kilmann et al. (1985) Schein also notes that several cultures may be operating within the same organizational unit. Often, individual subgroups within an organization will have their own subcultures operating and evolving. Schein concludes that culture is learned, and, therefore, evolves with new experiences. He notes, finally, that culture can be changed if the dynamics of the learning process are understood.

The cultural metaphor is also applicable to school organizations. Deal (1987) cites a number of definitions of culture which closely concur with those of Kilmann et al. (1985) and Schein (1985). In linking schools to the definitions, Deal notes that the concept of culture helps to explain why schools and classrooms display such common and stable patterns across such varying conditions. Deal further notes that, internally, culture gives meaning to instructional activity, providing a bridge between the activity and the outcome; it also links individual identity with the collective identity of society. Externally, culture is thought to be one of the prime bonds linking the organization through t he logic of confidence (Meyer & Rowan, 1983). In applying the concept of culture to schools, Alfonso (1986) contends that it is important to distinguish between organizational climate and culture. Alfonso notes that the culture of a school is often based on history and tradition, with generations of reinforcement. Climate, on the other hand, can be analogized as the personality of the school and is more readily changeable than the culture. Alfonso concludes that the climate of a school is often determined, largely, by the relationships between the teachers and the principal.

In summation, the concept of organizational culture generally encompasses the dimensions beliefs, values, norms, attitudes, and hidden assumptions which are deeply entrenched in the organization. These dimensions act as unwritten guidelines for behavior, developing and

evolving when individuals join together to form an organization. Culture is passed on from generation to generation through stories, rites, and rituals. School cultures build bridges of meaning between instructional activities and outcomes.

An Analysis of the Cultural Metaphor: Its Strengths and Limitations

In discussing organizations as cultures, Morgan (1986) has suggested a number of strengths for the use of the cultural metaphor in the study of organizational life. Initially, he suggests that the cultural metaphor focuses attention on the human side of organizational life. He states that, "One of the major strengths of the culture metaphor rests in the fact that it directs attention to the symbolic or even "magical" significance of even the most rational aspects of organizational life" (p. 135). Secondly, Morgan notes that the cultural metaphor provides a new focus and route for creating organizational activity. Cultural avenues are a valuable way to for all organizational members to create and recreate experiences of common meaning which help the organization develop stronger goal consensus. These two points are among the most valuable for the creation of an effective school culture. Schools which place a strong emphasis on goal consensus and on care and support of the human resources are likely to develop strong, effective school cultures (Firestone & Corbett, 1988).

Other strengths of the cultural metaphor include creating a way to reinterpret traditional management concepts and processes. Morgan (1986) notes that the cultural metaphor allows managers and policy makers to reinterpret the roles they play in constructing organizational reality. The cultural metaphor also encourages managers to reexamine and reinterpret the roles and behaviors of others in the organization. Concurring with Morgan, Sergiovanni (1987) states that managers in effective organizations, "... bond people together by developing a shared covenant and common culture" (p. 120). Morgan also suggests that the cultural metaphor assists in the reinterpretation of the nature and significance of the organizations relationship with the environment. He notes that organizations make sense of their environments through social enactment. Commenting further, Morgan states, "Organizations choose and structure their environment through a host of interpretive decisions. One's knowledge of and relations with the environment are extensions of one's culture" (p. 136). The environments of organizations tend to reflect the cultures of those organizations. School organizations which are portrayed as being effective by teachers and administrators are likely to be perceived as effective by the rate payers and supporters (Meyer & Rowan, 1983).

Morgan (1986) notes that one final strength of the cultural metaphor is the way in which it enhances our understanding of organizational change. In the past, change processes have often been regarded as technical and

political in nature (Morgan, 1986; Corbett, 1987). Morgan contends that, while this is true in part, effective change depends on changing the cultural variables including the images, norms and beliefs. The views of Purkey and Smith (1985) concur with those of Morgan. They note that the development of policies and school improvement plans which work toward cultural improvement in schools is the only way in which effective school changes will occur. Purkey and Smith, Morgan, and Corbett all caution, however, that there exists no one right way to positively influence the culture of an organization to bring about change. Plans for change must be contingent on the cultural variables of the organization in question or risk failure. Morgan comments that, "Attitudes and values that provide a recipe for success in one situation can prove a positive hindrance in another" (p. 138).

Although there are some significant strengths in using the cultural metaphor for understanding organizational life, there are also some limitations in the form of negative consequences. Morgan suggests that one of the more recent negative consequences has been the tendency for some organizational leaders, viewing themselves as organizational gurus, to attempt to create new, stronger cultures through processes which resemble mind control and cultism. Similar concerns have been reiterated in the writings of Hodgkinson (1983) and Sergiovanni (1984). Hodgkinson describes such phenomena as 'bureaucratic press' and suggests that the role of an ethical administrator is to guard against using or allowing such behaviors to be used to such an extreme degree of influence on among organizational members. Sergiovanni issues a warning to school administrators to be wary of becoming so entrenched with particular sets of values that they lose their ability to accurately evaluate the effectiveness of such values on the school and on student achievement. Morgan concludes with the warning, ". . . where the culture controls rather than expresses human character, the metaphor may thus prove quite manipulative and totalitarian in its influence" (p. 139).

The last negative consequence noted by Morgan (1986) is the tendency to view culture as a set of variables which include beliefs, stories, norms, rituals which bind together tightly to form a cultural whole. This view of culture is unnecessarily mechanistic, and may give the impression that culture can be manipulated in an instrumental way. Morgan contends that mechanistic, technical views give rise to managerial views which suggest that the cultures and individuals within organizations are manipulatable. Morgan suggests that cultures are more holographic than mechanistic in nature. He concludes that, "The holographic diffusion of culture means that it pervades activity in a way that is not amenable to direct control by any single group of individuals" (p. 139).

In summary, Morgan identifies five strengths related to the use of the cultural metaphor. The most important of the five for this review suggests

that culture is a useful and important aspect for understanding organizational change. Morgan also warns of two limitations to the cultural metaphor; both are related to the concern for cultural manipulation within organizations. Morgan has constantly reiterated the complexity of the cultural metaphor.

In the next section, the cultural metaphor will be linked to the structural and the political variables to create a framework for use in the research on the implementation of policy. The framework will be used to examine relationships between a continuum of policy implementation strategies and processes and a continuum of the structural and cultural linkages found in educational organizations.

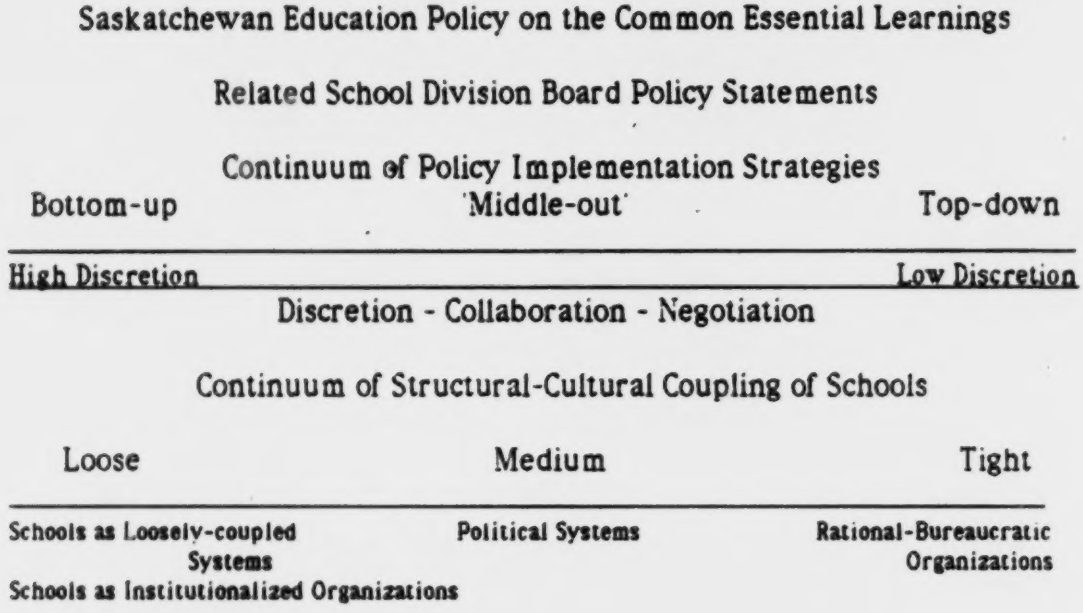
A Framework for Research on the Relationships Between Policy Implementation Strategies and the Structures and Cultures of Educational Organizations

The study of any policy implementation involves the study of the strategies used to implement the policy and the context of the organization into which the policy is being implemented. The first section of the framework presented in this paper (Figure 1) illustrates a continuum of policy implementation strategies and the processes which are used in the strategies. The second section of the framework is an illustration of the various degrees of coupling which are thought to occur in educational organizations, and links the coupling and cultural metaphors. The framework is designed to be interactive in nature. Each set of relationships in the framework will be discussed separately.

Policy Implementation Strategies

Strategies used in the implementation of educational policies have varied greatly. Wise (1983), Common (1983), Cuban (1984), Purkey and Smith (1985), and Timar and Kirp (1989) have discussed issues and dilemmas related to 'top-down' and 'bottom-up' implementation strategies. Barrett and Fudge (1981) have discussed the importance of discretion and negotiation as part of the policy implementation strategy. Common and Seashore Louis and Dentler (1988) have discussed the importance of collaboration between policy implementers and the teachers who will be expected to carry out the tasks introduced through the policy. Policy implementation strategies are likely to influence and be influenced by the organizational context in which the strategies are being used.

Figure 1. **A Framework Relating Policy Implementation Strategy and the Structures and Cultures of School Organizations**



The Structures and Cultures of Educational Organizations

Firestone and Herriott (1982) suggest three images of organizations which are commonly used to describe schools. Each is described in terms of the looseness or tightness of the coupling which bonds the components of the organization together. The tightly linked schools are related most closely to the image of a rational-bureaucracy with clearly defined roles, rules, and clearly delineated lines of authority. The opposite image is that of schools as loosely coupled systems or institutions, in which the components tend to operate separately of one another and a 'logic of confidence' (Meyer & Rowan, 1978) is thought to exist. The two loosely coupled images have slight variations on the meaning and outcomes of discretion among group members. Weick (1976) indicates that, when group members are loosely coupled, they have increased discretion about their activities and may tend to work together more closely to produce a tight culture and, as a result, a more tightly coupled organization. Weick's interpretation is further exemplified by Peters and Waterman (1982) who label the loose coupling and high discretion phenomena as 'simultaneous loose-tight coupling' and suggest that this type of coupling is responsible for worker motivation and excellence in organizations which have been highly successful. In Meyer and Rowan's definition, tight coupling is achieved through the presence of rules and well delineated procedures; loose coupling results from the lack of

controlling mechanisms, but also from lower discretion among group members.

Between the rational-bureaucratic and the loose coupling images is the image of the school as a political system. The political system image relies, partially, upon the logic of confidence, but is also thought of as being tightly coupled, similar to a rational bureaucracy, in the areas related to goals and roles which are clearly delineated. The political image focuses on the aggregation and dispersal of power throughout the school; therefore, the political image suggests a school which exists as a negotiated order which is constantly shifting to pressures from within and without the organization (Patterson et al., 1986).

The culture of the organizational context is also seen as an important coupling mechanism. Peters and Waterman (1982) strongly contend that cultural bonds can act as strong mechanisms for tight coupling among actors who are involved in the work tasks of an organization. Because of the relationship which is believed to exist between culture and coupling in organizations, the cultural and structural factors have been placed on the same continuum. A brief discussion of additional relationships which are part of the framework is presented in the next section.

Relationships on the Framework

The main relationships on the framework for the study of policy, structure and culture in school organizations are between the continuum of policy implementation strategies and processes and the continuum of patterns of structural-cultural coupling in schools. The relationships on the framework are perceived as being interactive, flowing both downward and upward. The downward flow is perceived as beginning with statements of policy; from the policy statements the relationship flows to the continuum of policy implementation strategies which extend from top-down strategies on the extreme right, through 'middle-out' strategies at the center, to the bottom-up strategies on the extreme left. On the underside of the continuum, the processes of discretion, collaboration, and negotiation are listed. Located directly beneath the main continuum of policy implementation strategies is a sub-continuum which is labeled as 'low discretion' on the right end and 'high discretion' on the left end. The sub-continuum is to be used for recording the amount of discretion which members of the organization have in implementing policies. The degree of discretion actually found can then be compared with the degree of discretion which has been indicated in the chosen strategy for policy implementation. Since implementation strategies vary with the policy statements for which they are designed, and may also vary at different times during the implementation process, the use of the continuua allow for the flexible rather than absolute placement of both strategies and degrees of discretion.

The next relationships illustrated on the framework are those between the continuua of implementation strategies and the degrees of discretion, and the structural-cultural coupling of schools. The degrees of structural-cultural coupling are represented on a continuum ranging from loosely to tightly coupled, with a medium degree of coupling being at the center. This continuum is designed to represent a number of possibilities for patterns of structural-cultural coupling; any given school organization would be able to be placed somewhere on the continuum. On the underside of the continuum of structural-cultural linkages are noted four prominent images of school organizations: loosely coupled systems, schools as institutions, schools as political systems, and schools as rational bureaucracies (Firestone & Herriott, 1981; 1982; Weick, 1976; Meyer & Rowan, 1983). The decisions made by school division boards and administrators about the implementation strategies which they will use are likely to impact on the degrees of coupling in school organizations (Wise, 1983; Cuban, 1984; Purkey & Smith, 1985; Firestone & Corbett, 1988). The impact will appear as patterns of structural-cultural coupling on the continuum of structural-cultural coupling for each school.

In summary, the relationships noted on the framework relating policy implementation to the structures and cultures of school organizations are interactive in nature, flowing both downward and upward. The first relationship is between a given policy statement, the implementation strategies, and the degrees of discretion noted among the organizational participant during the implementation process. The second relationship is between the policy implementation strategies, degrees of discretion, and nature of the structural-cultural coupling in school organizations. Both relationships are illustrated by continuua because they represent varying rather than absolute placements among the three variables. In the concluding section of the discussion, the use of the framework for research purposes will be discussed.

Conclusions: How Can the Framework Be Used?

At the outset of the discussion, it was noted that the discussions of research and the resulting framework were the initial stages of thought on the development of a research process through which the relationships between policy implementation strategies and the structures and cultures of educational organizations could be studied. Having concluded a review of the literature and the development of a framework, one must now begin to examine ways in which the research process might begin. The first thing to realize is that the framework is interactive in nature. This means that information can flow down though the framework or move up the framework. Since the framework is interactive, the study could begin with an investigation of patterns of structural-cultural coupling in a number of

schools, and then extend upwards to investigate the degree of discretion and the strategies which are chosen to implement or even develop policy. From the bottom-up standpoint, the investigation could develop procedures similar to those suggested by Purkey and Smith (1985). The investigation could also begin at the top of the framework with a policy statement issued by a school division board. In the second case, the research process would move from the top to the bottom of the framework. The investigation could also move from the policy implementation strategies both up and down the framework. Due to the interactive nature of the framework, the relationships may even be able to be described as a cycle for policy implementation or development, depending upon where the cycle was begun.

The framework can be used to derive a number of research questions such as: What are the patterns of structural-cultural coupling among the schools in one school division?; How are the patterns of structural-cultural coupling in secondary schools different from those in elementary or kindergarten to grade twelve schools?; Describe the strategy used to implement a given policy statement.; Describe the degree of discretion which teachers have in implementing the curriculum policy into their classroom teaching.; What is the relationship between the statement of policy and the strategy which has been chosen to implement the strategy? Once the main questions have been chosen, the framework may be used to develop further guiding questions and to be an advance organizer for assisting researchers and readers of research in determining how the questions are related to the investigation as a whole.

This paper began as an exploration to determine whether policy, coupling, and cultural factors are related to change in educational organizations. A review of the literature leads one to believe that each of the three factors are of importance in studying change processes. Rather than concluding with answers, however, the paper has concluded with several key questions and a the beginning stages of a framework which should be useful for developing research processes to determine how each of the factors are related to specific change processes in schools and school divisions.

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